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## NEWS

### **Orion Advisor Academy Debuts**

**The new, on-demand learning platform is based on the work of Dr. Daniel Crosby, the wealthtech company's chief behavioral officer.**

Rob Burgess | Feb 23, 2023

On Wednesday, wealthtech company Orion Advisor Solutions announced the launch of Orion Advisor Academy, "a new on-demand learning platform that provides practical, actionable education for advisors to improve and grow their businesses while earning continuing education (CE) credits," according to a release.

The platform is based on the work of Dr. Daniel Crosby, Orion's chief behavioral officer, who said all the courses are evidence-based, "sometimes based on my review of existing literature, and other times based on original research we have done here at Orion."

Their course, "The Psychology of Sales," references "the deep body of influence and persuasion literature," while their upcoming "Love and Money" offering "is based on original research we conducted into the primary friction points couples experience around money," said Crosby.

"Whether the research is in-house or summarized from external sources, participants can expect that what they are getting is both research-based and practical," said Crosby.

Crosby said they regularly survey their advisors “to understand their needs and wants because, first and foremost, our courses are created to meet advisor demand.”

“Additionally, we decided to lead with a behavioral-finance-first approach based on the extensive and growing body of literature that shows how central it is to improving both client and advisor outcomes,” said Crosby. “Just as Orion itself seeks to be a comprehensive provider of tech and asset management services for advisors, The Orion Advisor Academy is positioned to be a one-stop destination for advisor education. We will be creating enough new content each year that a CFP could meet all of her practice management needs here at The Academy, all at no cost.”

Philipp Hecker, co-Founder and CEO of Bento Engine, said as wealth management “continues its evolution from an industry into a profession, more rigorous and standardized training programs are key to success.”

“Both upfront to establish a baseline of advisor competency, and ongoing to ensure fluency with the ever-changing laws and regulations,” said Hecker. “On that journey, firm-sponsored ‘on demand’ and ‘in the moment’ programs such as the Orion Advisor Academy can be useful complements to the time-tested approaches of rigorous certification and in-person training.”

As of September 2022, Orion supported \$3 trillion in assets across its CRM and portfolio accounting systems. On the TAMP side of the business, it supported \$59 billion.